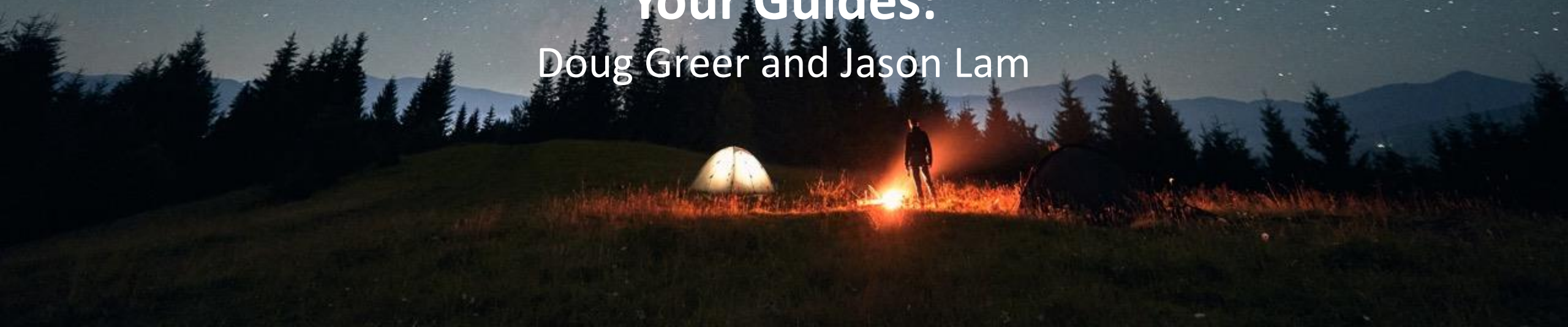




Apptio and Clarity, Complementary Tools

Your Guides:

Doug Greer and Jason Lam



Agenda

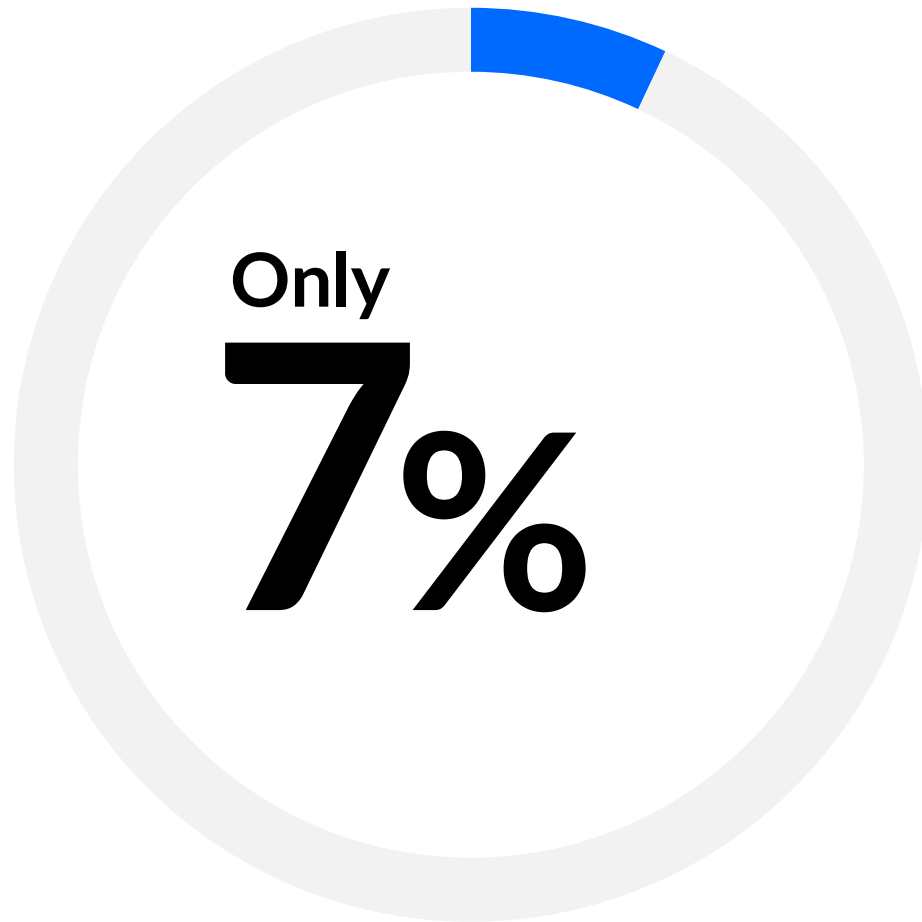
- Typical Challenges
- Apptio Introduction
- Clarity / Apptio Solution
- Apptio Demo

Challenges

<Descriptor>



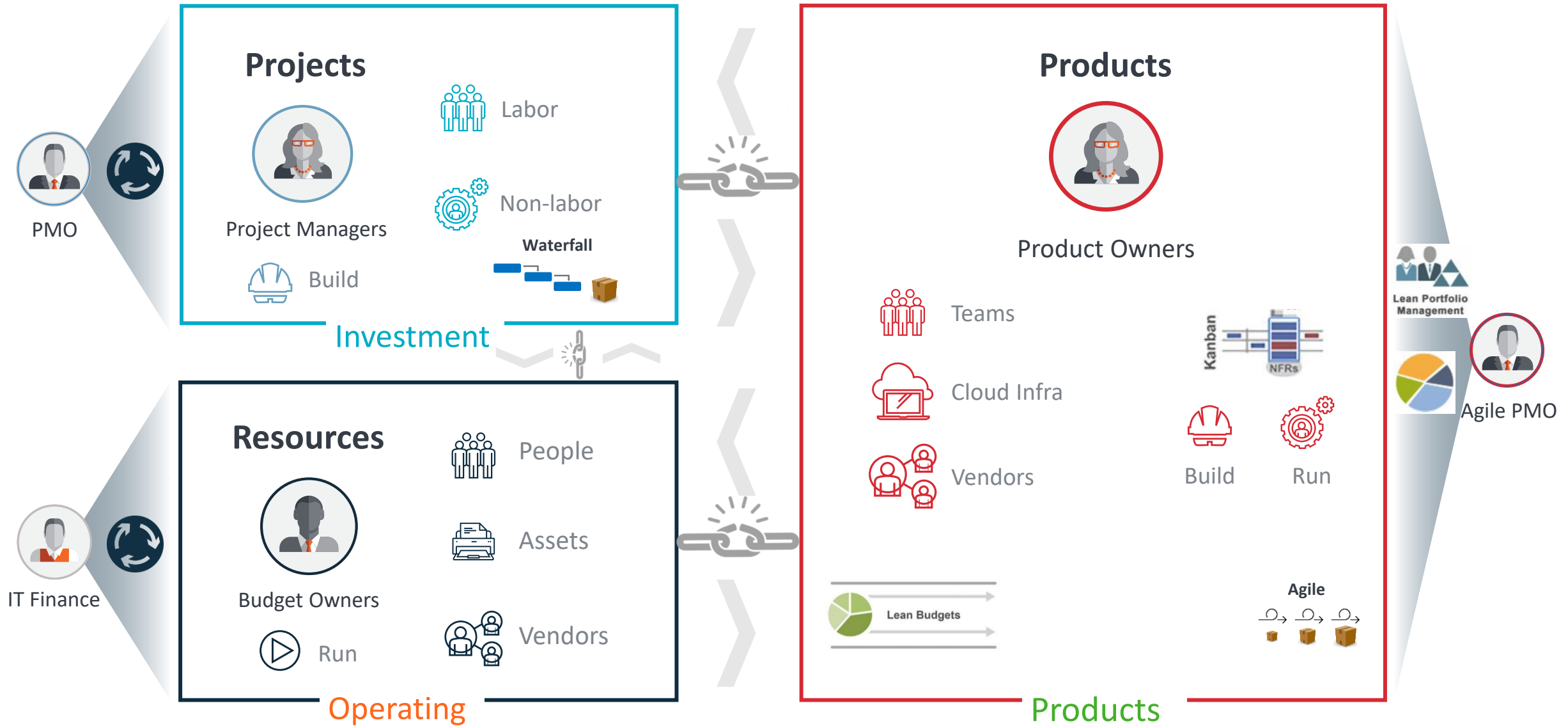
Let Rego be your guide.



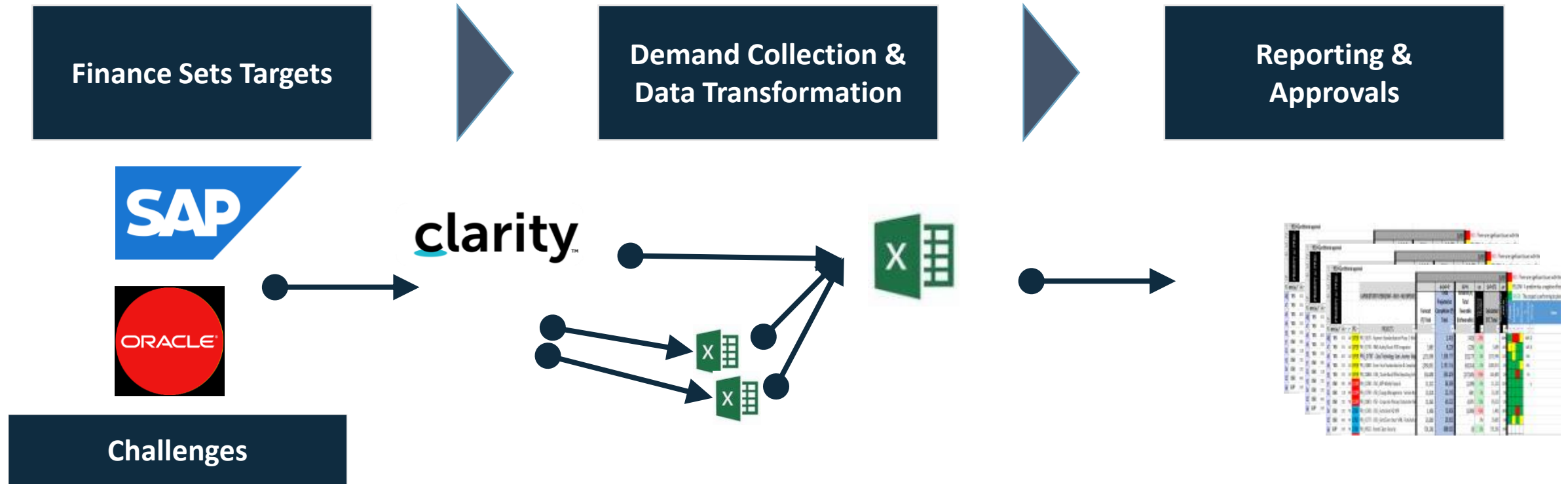
Only 7% of organizations said they are consistently successful at demonstrating the business value of technology, primarily due to a lack of measurable value/metrics.

Gartner

Investment / Operating / Products Disconnect



Typical Planning Process



- Leadership lacks visibility and requires granularity for control
- Heavy manual efforts to transform the data
- Larger margin for error possible depending on tool selection
- Time-consuming across multiple FTE's to prepare leadership presentations
- Inability to scale

Typical Points of Collaboration for PMO & Finance

7

Capex/Opex

Rules for classifying labor as capital or operating.



Integration Points

Integration points between PMO-owned and IT Finance-owned systems



Rates

Level of detail for rates, as well as the rates themselves



CIP

Trigger to CIP account for capital project completion (i.e. go-live)



Systems of Record

Systems of record for financial data



Budget Data

Required project budget/forecast data dimensions



70% of IT executives struggle to foster collaboration between project & finance stakeholders

PPM Financial Challenges

- ▶ **Complicated Processes & Reporting:** PPM systems with financial capabilities unnecessarily pull PMs into financial planning duties, and complicate processes for both PM and IT Finance teams
- ▶ **Limitations for Project Accounting:** Lack of system for true project accounting (Depreciation/amortization, vendors, cost centers, contracts, assets, GL accounts, etc)
- ▶ **Limits for Run the Business Planning:** Cannot plan out-year operational phase of projects, leaving PMO blind to realities of the full financial lifecycle of new initiatives.

Agile Financial Challenges

- ▶ **Investment Prioritization:** How are investments evaluated and prioritized in moving from waterfall to Agile or hybrid- Waterfall/ Agile environment?
- ▶ **Resource Optimization:** Where do we optimize resources to for new innovation, maintenance, and quality efforts?
- ▶ **Value Tracking:** How to we track the \$ value of product delivered based on the investments made and resources allocated?
- ▶ **Labor Capitalization:** How do we shift from traditional capitalized labor tracking and accounting to an Agile one, considering that time is no longer based on timesheet process?

Apptio Introduction



Let Rego be your guide.

What is Apptio?



Apptio is the market-leading IT Financial Management (ITFM) / Technology Business Management (TBM) solution for IT organizations



It is a business management system to measure technology investments, plan for the future, and communicate the business value of IT.

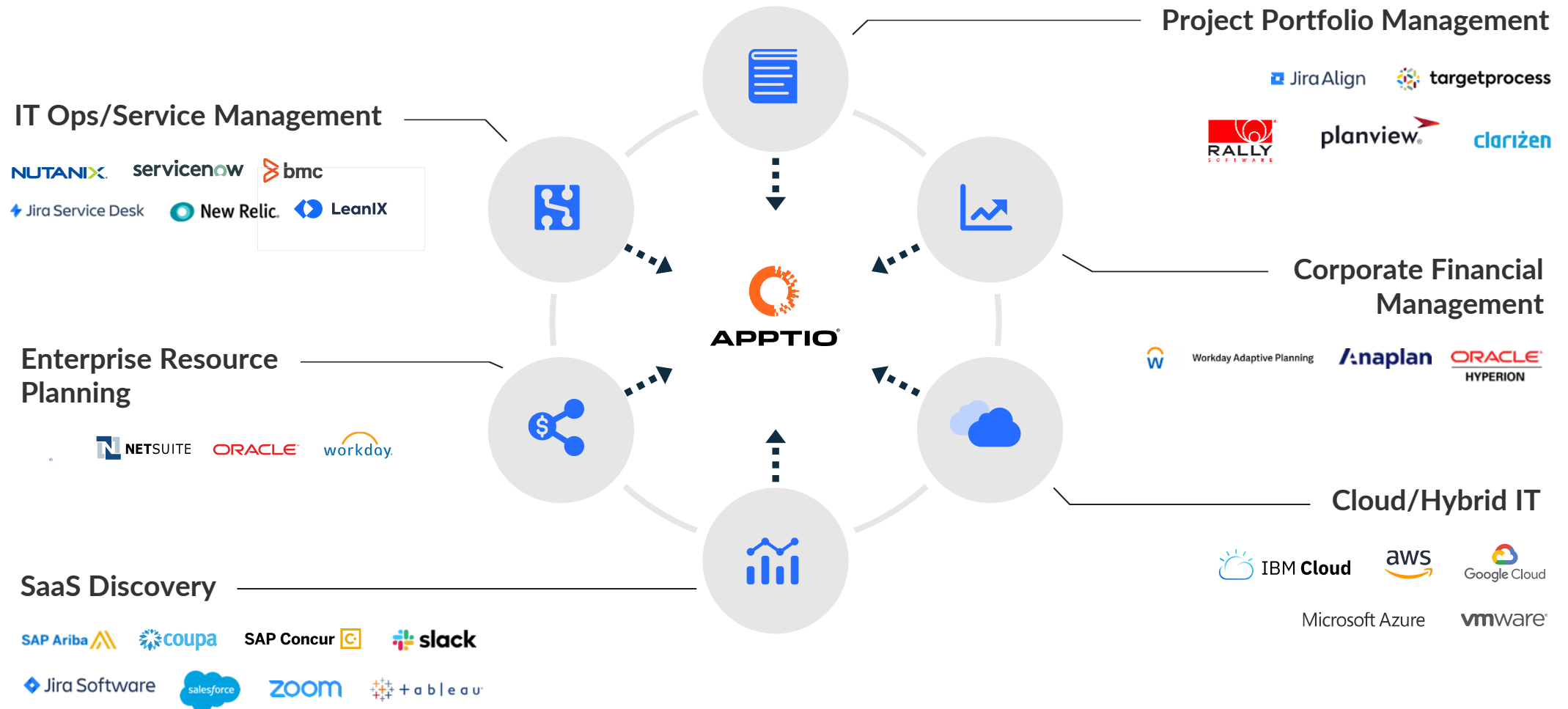


It helps IT leaders make data-driven business decisions by providing analytics and insights into the cost, quality, and value of IT.

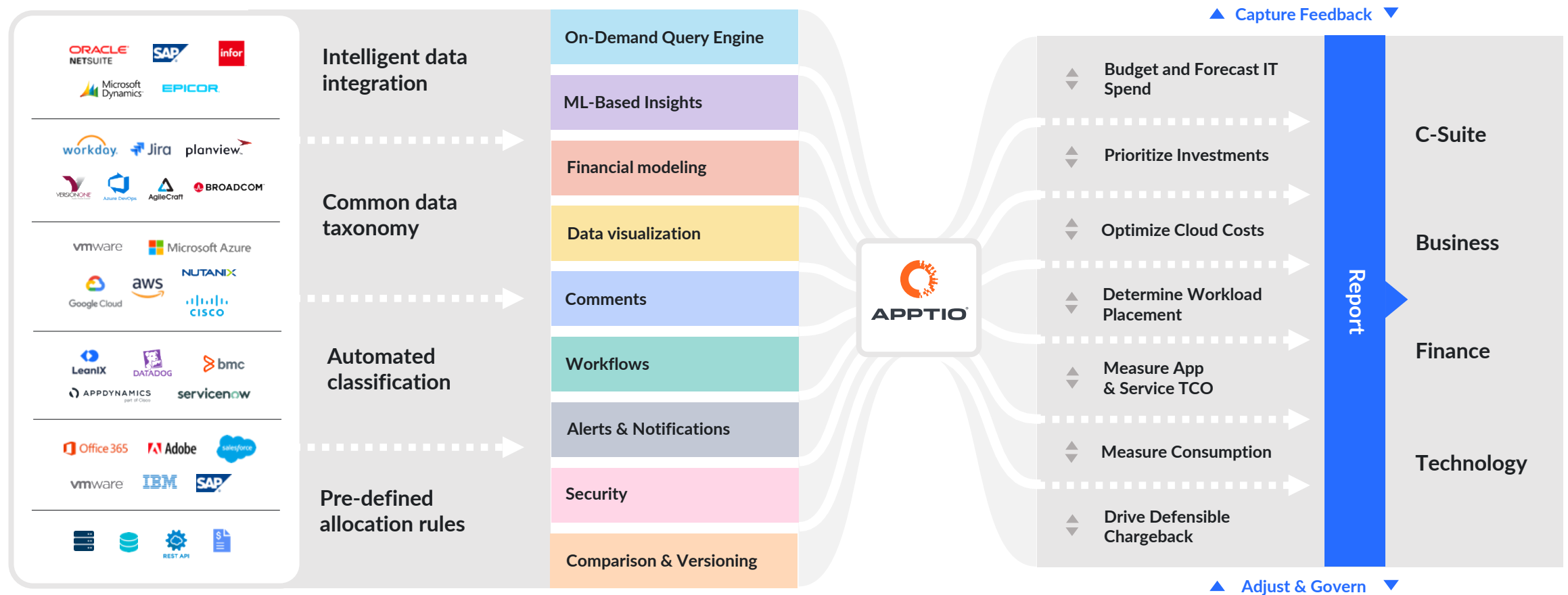


It automatically aggregates, cleanses, and establishes relationships across large amounts of data from disparate sources

Apptio: The Strategic Financial Decision Engine



How Apptio Works



Apptio Product Portfolio

ApptioOne^{MX}

ApptioOne

ApptioOne Plus

ApptioOne Billing

ApptioOne Benchmarking

Cloudability^{MX}

Cloudability

Cloudability SaaS

Cloudability Shift

Planability^{MX}

Apptio Targetprocess

Planability Demand

Clarity / Apptio Joint Solution



Let Rego be your guide.

Apptio Complements Clarity

PPM



clarityTM



PPM Data	Apptio Data
Projects	Projects Master Data
Resources	Labor Master Data



Budgets

Plan Work to Deliver Projects

Project intake & selection
Labor planning for execution
Task scheduling & management

Plan Costs of Project Work

Project funding & budget approval
Plan spend for all resources
Project impact on build & run costs

Apptio + Clarity Outcomes



Unify

Unify portfolio and operational IT budgeting/forecasting process



Remove Complexity

Remove finance-driven complexity from Clarity and shift those processes to Apptio



Collaboration

Better collaboration between the PMO and IT Finance to avoid unwieldy hand-offs that slow down initiatives



Forecast

Forecast changes in operational spend or labor usage that a project will trigger post go-live



Contracts & Assets

Support for tracking contracts and assets related to a project



Best of Both Worlds

Use the best functionality of each system – giving both the PMO and IT Finance the capabilities they need

Best Practice Recommendations

Approach

- Leverage the best capabilities of Clarity/Apptio for a joint solution
- Customer experience focus -- one place to do things
- Don't turn PMs into financial analysts

Desired Outcomes

- Bi-directional, multi-point Apptio/Clarity integration
- Alignment of time tracking, resource mgmt, etc to TBM within PPM, with PPM feeding data to Apptio
- Streamlined cross-tool demand management / project lifecycle process
 - Demand, prioritization, project selection, approval, & handoffs between tools
- Streamlined cross-tool project-related financial processes
 - Budgeting, forecast, baseline, change control, & handoffs between tools

Pitfalls to Avoid

Insufficient Clarity / Apptio integration

Duplicate entry of data, resulting in inefficiencies

Jumping between systems to find information, resulting in a poor customer experience

Lack of uniform project lifecycle management, including financial governance, across both PPM and Apptio

Data misalignment, with the inability to join data across systems (such as resource allocations, timesheets, and actual costs)

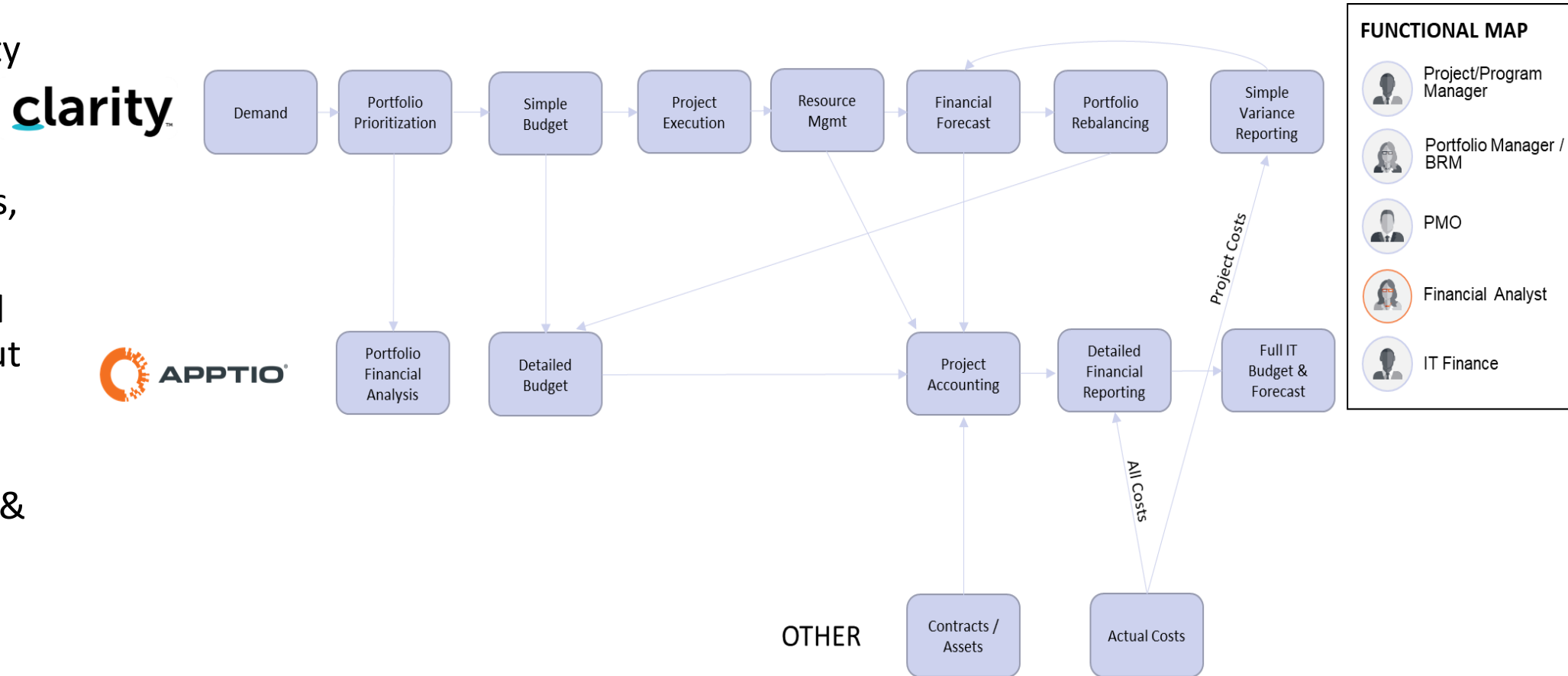
Non-uniform resource management process across systems

Project costs not being delegated to departments post-implementation

Typical Apptio / Clarity Data Flows

Scenario 1

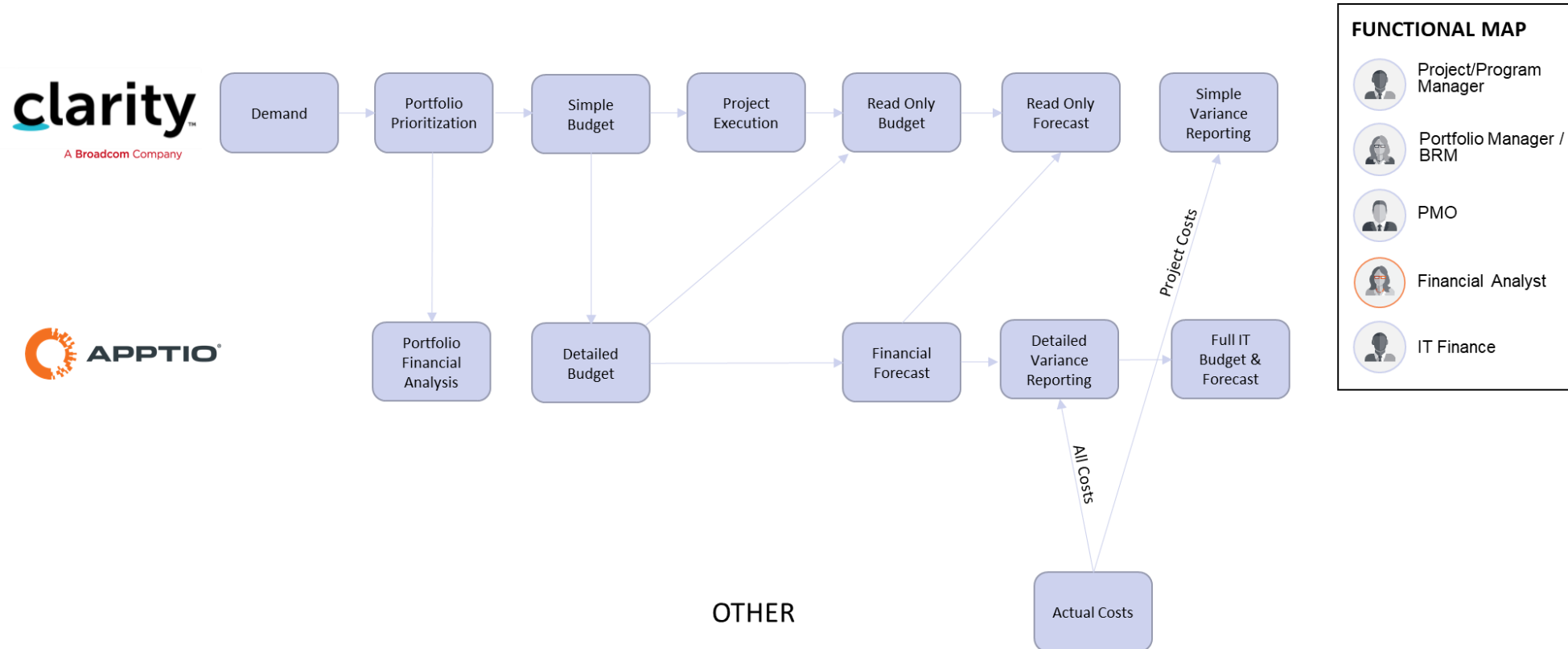
- Maximize use of Clarity functionality
- One-way integration with Apptio – Financials, Portfolio, RM
- PMs have financial responsibilities, but stay entirely in Clarity
- Financial Analysts & Senior leadership use Apptio



Typical Apptio / Clarity Data Flows

Scenario 2

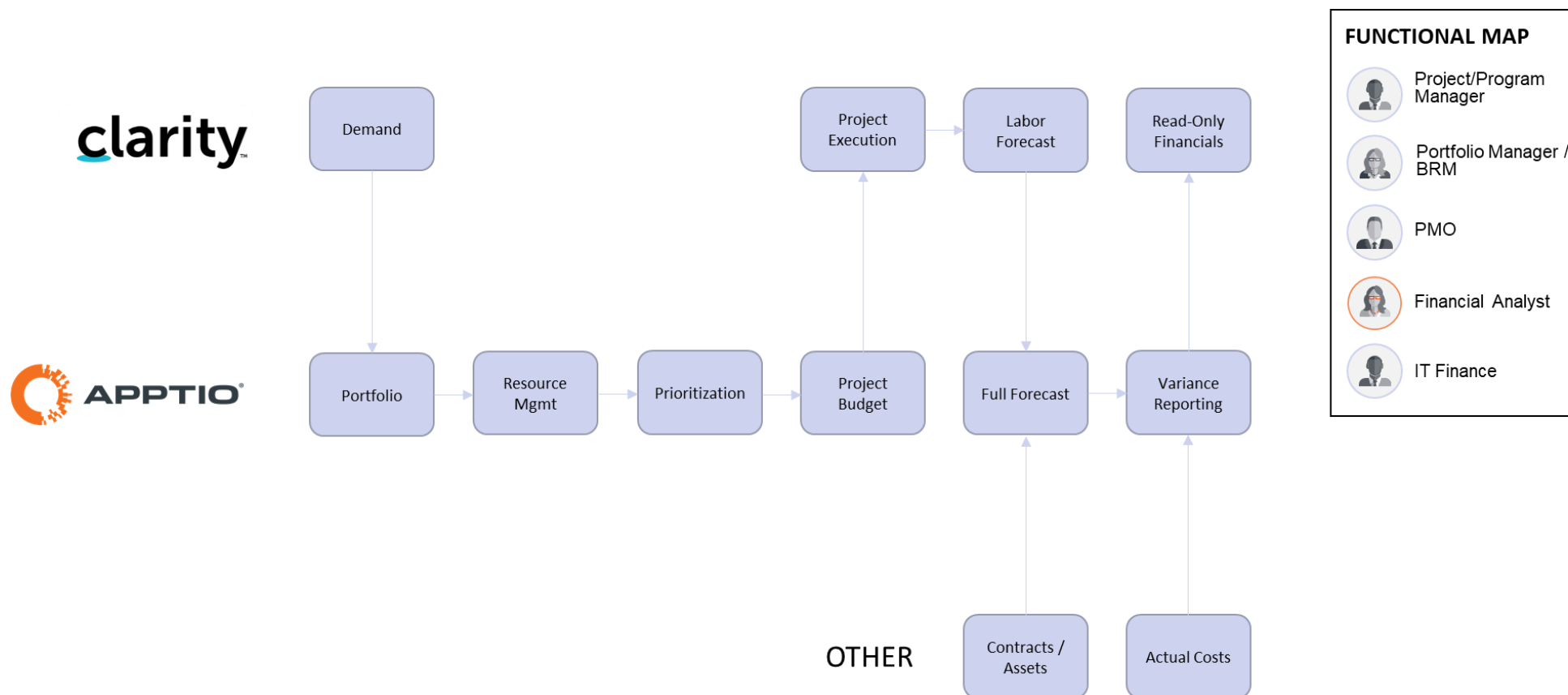
- Use Clarity for most functions, but limited financials
- Bi-directional integration with Apptio – Financials sent to Clarity read-only
- PMs have limited financial responsibilities, only responsible for internal labor cost



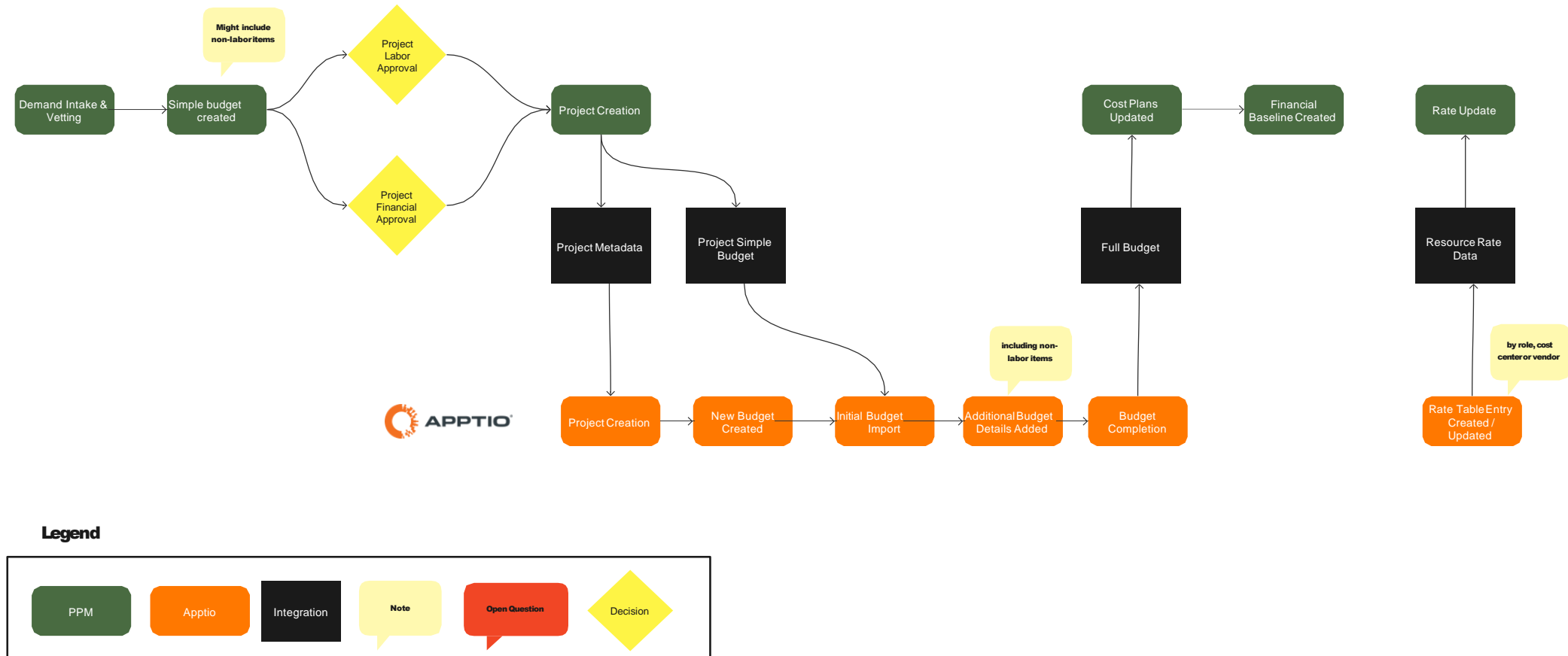
Typical Apptio / Clarity Data Flows

Scenario 3

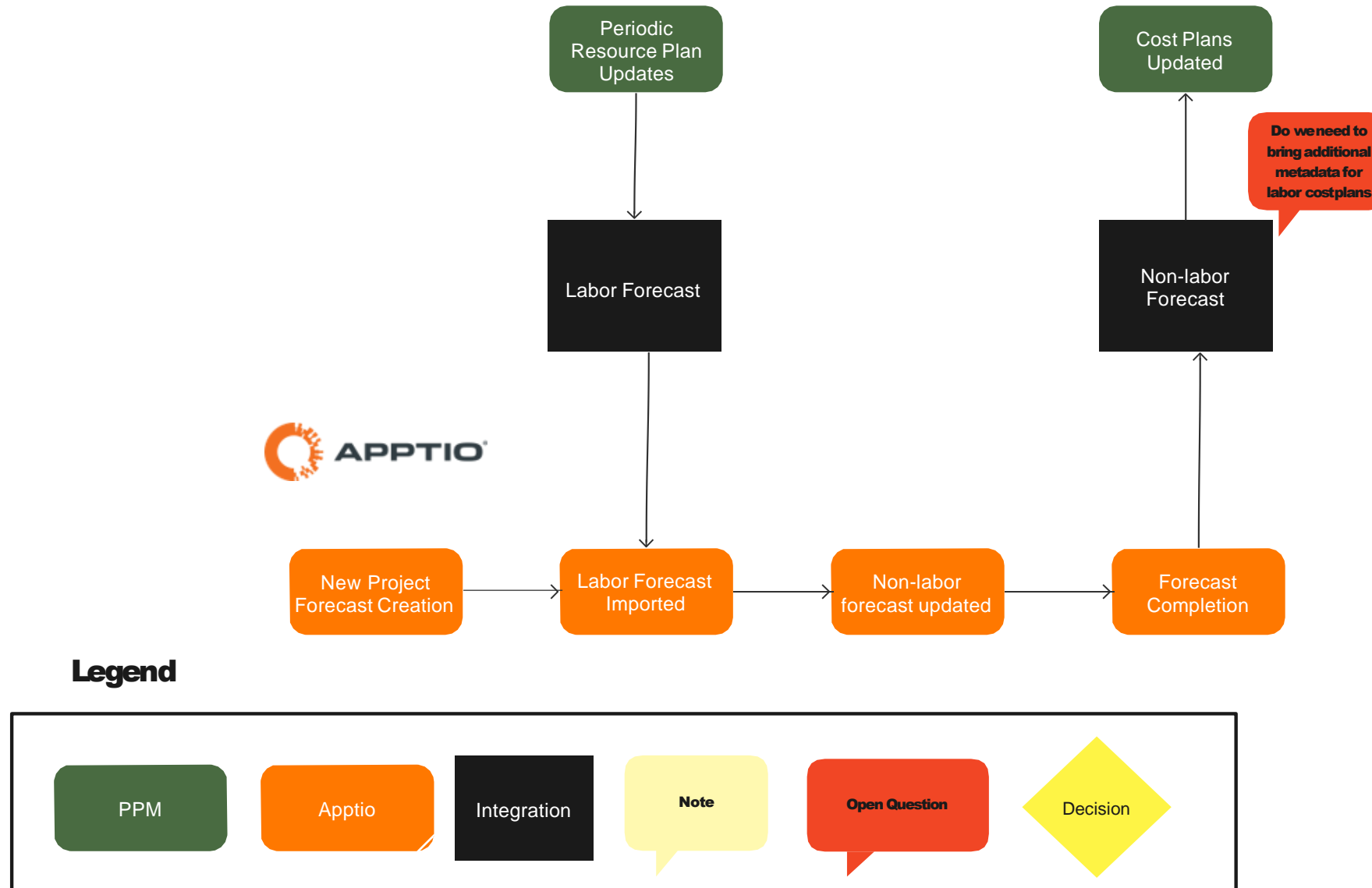
- Maximize the use of Apptio functionality – Prioritization, Portfolio Mgmt, RM
- Portfolio & Resource Managers use Apptio
- Bi-directional integration with Apptio
- PMs are split between systems – using Apptio for financials and Clarity for everything else



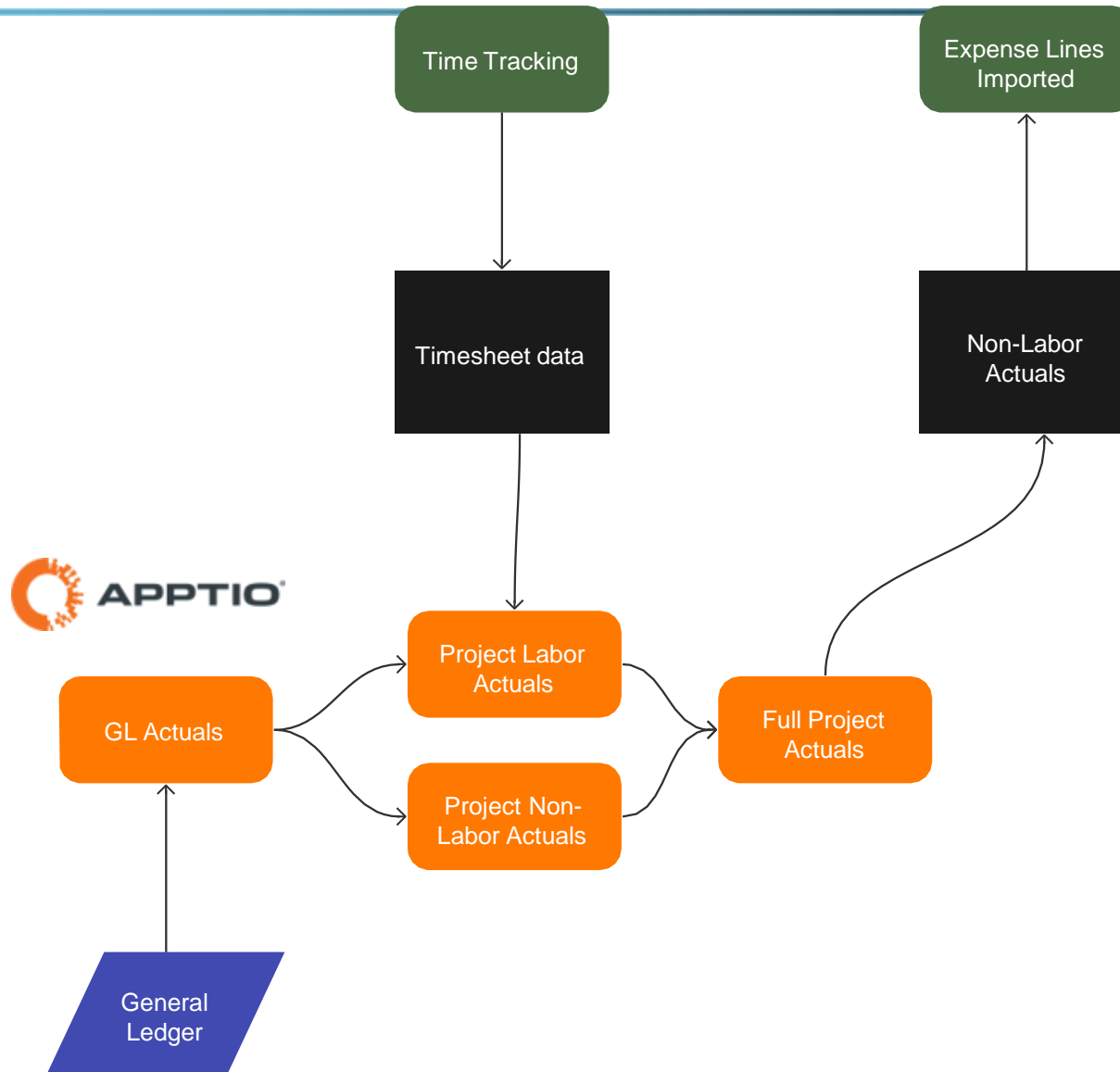
Labor, Budget, and Rate Sync



Labor & Non-labor Forecast Sync



Labor & Non-labor Actuals Sync



Apptio Demo



Questions?



Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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